

**Monthly Report to the Special Trustee  
Office of Trust Records  
May 2000**

**Following are highlights of records management activities performed by the Office of Trust Records during May 2000.**

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**STAFFING**

- ❖ **Management Analyst positions** (develops records management policies, procedures, standards, retention schedules, and guidelines; develops and implements training curricula and training aids; etc.)
  - Two of four positions filled via administration transfers; two positions to be advertised
- ❖ **Records Management Specialist positions** (implement records management program, BIA disposition backlog, records cleanup, etc.)
  - 11 of 12 positions filled; one position to be advertised
  - One supervisory position to be classified and advertised
  - Records Center Specialist position filled for OST records centers
- ❖ **Computer Specialist positions** (analyzes, develops, implements)
  - Information Technology solutions, manages projects to implement Electronic Records programs for OST and BIA)
  - Two position descriptions (one GS-14 Supervisory Computer Specialist and one GS-13 Computer Specialist) are ready; not announced

**TRAINING**

- ❖ **BIA:** records management awareness seminar provided to Eastern Oklahoma Regional program personnel and tribal staff; and Palm Springs (10) and Riverside Agencies (18) (Pacific Region)
- ❖ **OTLSR:** staff attended NARA conducted training on Electronic Records, Disaster Recovery, and Vital Records; and Falmouth Training, Inc., training on Indian Law and Creative Writing for Results; various staff attended technical training and are working on self-training on technical subjects

**CONTRACTORS**

- ❖ Contract for Web development was completed successfully; current focus on task orders for enhancement projects
- ❖ Contract for imaging is progressing; Approved Technology Investment Analysis (TIA) from the Department of the Interior's Chief Information Officer was received June 9, 2000; The contracting office is currently working on the Request for Proposals (RFP) and OTLSR is completing the Statement of Work (SOW)

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- ❖ Iron Mountain Records Management Services Contract - rebox, inventory, and prepare records for transfer to Federal Records Center (FRC) following sites:
  - Southwest Region – Water Rights Office (357 boxes)
  - Rocky Mountain Region – Northern Cheyenne Agency (500 boxes) and Regional Office (1,200 boxes)
  - Great Plains Region (700 boxes)
  - OTLSR, Hawkins Records Center – continuous work (approximately 1667 boxes completed)
- ❖ Contract awarded to advertising firm to develop records management “technical leaflets” to be used as training aids in conjunction with formal classroom training and briefings

**OTHER WORK**

- ❖ On-going work with Office of Information Resource Management (OIRM), BIA in Albuquerque regarding planned procedures for moving their data to Reston, Virginia, for parallel testing
  - Also facilitating a physical inventory of computer tapes in OIRM’s possession
- ❖ **Disposition Backlog at BIA Locations**
  - Record boxes ordered and “drop shipped” to BIA agencies for local “clean up” and transfer to Federal Records Centers
  - Continued working with BIA locations to approve and coordinate transfer of records to Federal Records Centers
  - Performed records assessment at Palm Springs and Riverside agencies to identify records (both onsite and off site) available for transfer to Federal Records Center
- ❖ **Systematic Centralization of OST Financial Trust Records**
  - 160+ additional boxes of “on-going work” received at OST records storage facility
- ❖ **Records Control Schedules**
  - Met with NARA representative to establish schedule for development of BIA/OST General Records Schedule (GRS) section
  - Developed preliminary plan for development of OST records control schedule—focusing on OTFM and automated systems first
  - Met with U.S. Department of Treasury officials to review and discuss the proposed Treasury trust financial records retention and control schedule

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- ❖ **Analyze Records Storage Requirements**
  - Visited Palm Springs and Riverside agencies to determine records storage requirements for active records
- ❖ **Establish Life Cycle Database (Inventory) for Trust and Other Records**
  - Versatile Enterprise by Zasio selected as software to be used to develop records inventory and to manage boxes of records stored at OST records centers
- ❖ **Begin Cyclic Evaluation of Records Programs**
  - Records program evaluations conducted at Palm Springs and Riverside Agencies (Pacific Region)
- ❖ **Train and Provide Technical Assistance for Compacted and Contracted Trust Records**
  - Met with Pueblo of Laguna
  - Met with Cherokee Nation
  - Cherokee Nation employees attended records awareness seminar held at Eastern Oklahoma Region
- ❖ **Publish Trust Records Instructional Guide in Conjunction with MMS, BLM, and OHA**
  - Draft narrative of trust history developed as preface for manual